



SPiN: Strategic Planning in Nonprofits

Initial Strategic Planning Meeting Agenda

Introductions/Check-in

- What positive planning experiences have you had? What would you recommend we do to make this planning process valuable and relevant?

Key Issues

- What do you feel are the key issues facing the organization at this time?
- What strategic questions do we need to answer through the planning process?
- What are some generative topics you have been longing to discuss as a board?

What type of plan do we want?

- What have the organization's past plans looked like? What do you like and dislike about the last plan?
- Do you want a three-year plan?
- What elements do you want your plan to contain?
 - Required: mission, vision, strategic priorities, objectives
 - Recommended: organizational history/background, identity statement, outcomes, monitoring plan
- What pieces already in place will you carry forward? Does your mission need review/updating?

Stakeholder Input

- Who are key stakeholders of this organization?
- What input have you already gathered from these stakeholders?
- What additional outreach would be useful to inform planning?

Other Data to Gather

- What else do we need to know to make good decisions about the key strategic questions we identified?
- Does the entire board and staff have a good handle on our financial situation and our current funding model? Do we need to prepare a summary?
- Would we benefit from an organizational assessment to better understand our current organizational health and what our capacity building needs are?

Setting Our Course

- What is our desired timeline for planning, and what resources do we have to put into the process?
- How much time will the board commit? Can we hold a day-long retreat midway through the process?
- Do we have skilled staff or volunteers who can complete some of the stakeholder listening and data gathering we would like to do?
- Do we have any funding to invest in an outside consultant?
- How can we prioritize among our ideas to create a realistic planning scope?

